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ABSTRACT

This paper is a description of the requirements placed on persons selected to fill the role of extension agents for the purpose of penetrating an educational environment, installing change in an educational organization, and completing tasks as a resource outside of the education establishment. These experience concerns are summarized by describing steps in selecting an extension agent to assure need-responsive qualities and skills. Methods for selection of an extension agent are given: (1) the identification of linking to outside information or expertise as the appropriate strategy for organizational growth by key actors; (2) discussion of expectations about growth: characteristics of organization, environment, personnel, processes; (3) determination of expected results for extension agent activity; (4) determination of qualities for extension agent (preparation-of-rating scale); (5) determination of the selection process itself, including activities required of candidates; (6) completion of rating scale on all individuals; (7) informing the selected candidate about expectations of results; characteristics of the environment and organization, rating received, and evaluation/reporting procedures; (8) implementation; and (9) evaluation. (DMT)

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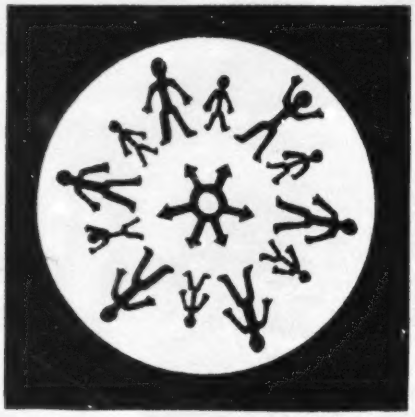
DEVELOPING EFFECTIVE EXTENSION AGENTS: EXPERIENCE CONCERNS



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Summer 1976

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DEVELOPING EFFECTIVE EXTENSION AGENTS:

EXPERIENCE CONCERNS

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A. Introduction

1. During its six years of existence, the New England Program in Teacher Education has maintained an on-going experiment with the role of extension agent in education. During the years the role has been called variously field agent, resource agent, service agent, boundary person, linking agent, program developer, project officer, client advocate, needs advocate, etc. All names seem to fit somewhat; all leave something unexplained. As more efforts are undertaken in the systematic diffusion of research and innovation that hope to respond to where educators are and where education is, more precise role descriptions are needed. This paper describes the requirements placed on persons selected to fill these roles by needs: (1) to penetrate an education environment, (2) to install change in an education organization, and (3) to complete tasks as a resource outside of the education establishment. These experience concerns will be summarized by describing steps in selecting an extension agent to assure need responsive qualities and skills.

B. Determining Expected Results

1. The extension agent role is abureaucratic, it is by definition different from any role, function, or job description developed task. It is not anti-bureaucratic nor anti-system, it is neutral about power, domain, authority.

2. But it is different and as different requires some thought. Will a role that does not by definition fit the rules be tolerated? Will a function that does by definition overlap be accepted? Can a job that has ambiguous responsibilities and therefore accountability be allowed? What can be expected from a field agent? How can an energizing force be targeted?

3. NEPTE's experience has been to begin by determining expected results: "What is the incumbent expected to produce?" In many environments where human, open, participatory decision-making is being developed the question itself is often rejected as inappropriate or at least as mechanistic. Experience remains. "What object," "what results," "what product" in whatever words is the key starting point and control point for determining the extension agent role, job, and function. Expectations by the parties involved in and the parties affected by the activity of this person need to be clarified, not previously in terms of how things are done (style) but more precisely in terms of what results.

4. NEPTE's experience is that three kinds of results require extensive discussion and specification by the actors involved:

   (a) level, amount, and type of penetration;

   (b) kind, amount, and time of installation;

   (c) quality, identity, and amount of task completion.

C. Penetrating an Environment

1. Few of us in education know much about the environmental characteristics of our organizations. At best we have a clear notion of the organization chart, the operating levels, the formal and informal power structure. We have little valid or accurate insight about the pattern or stage of our organization in growth terms.

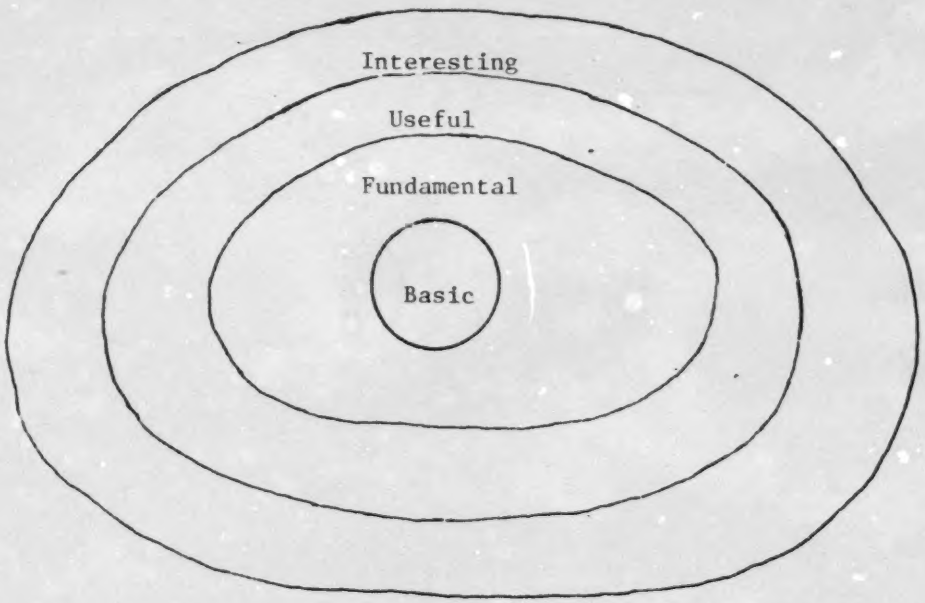
2. Clearly extension agents are growth energizers who must influence an institution where it is, as well as where it perceives itself to be. Somehow the extension agent needs formal clues about where the key actors place the organization on the following (or a similar) grid.

EXHIBIT I
Characteristics of organization growth

ORGANIZATIONAL CHARACTERISTICS	PATTERNS OF THE FIRST STAGE	PATTERNS OF THE SECOND STAGE	PATTERNS OF THE THIRD STAGE
Core problem	Survival	Management of Growth	Managerial control and allocation of resources
Central function	Fusion of diverse talents and purposes into a unified company	Fission of general authority into specialized functions	Fusion of independent units into an inter-dependent union of companies
Control systems	Personal (inside); survival in marketplace (outside)	Cost centers and policy formulation (inside); growth potential(outside)	Profit centers and abstract performance criteria (inside); capital expansion potential (outside)
Reward and motivation	Ownership, membership in the family	Salary, opportunities and problems of growth	Salary, performance bonus, stock options, peer prestige
Management style	Individualistic; direct management	Integrating specialists; collaborative management	Integrating generalists; collective management
Organization:			
Structure	Informal	Functional specialists	Division organizations
Executive's primary task	Direct supervision of employees	Managing specialized managers	Managing generalist managers
Levels of management	Two	At least three	At least four

3. On the other hand knowing these characteristics does not solve the penetration issue. It only identifies the points of influence. Listening to how the key actors talk about the environment gives clues about how a change and a person style will be perceived. How central a given change or style will be accepted results from discussion of the following influence grid.

EXHIBIT II

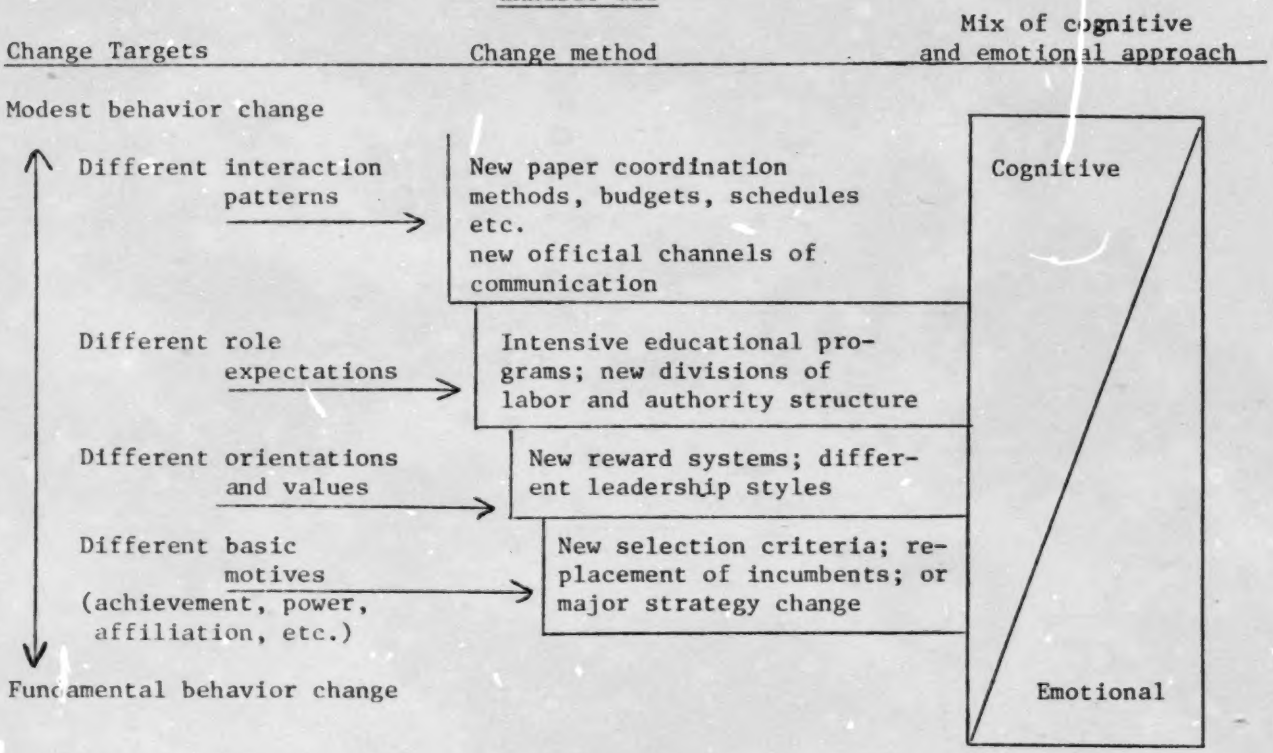


Each actor will hold certain information, processes, functions, domain in each of these layers. The deeper the layer, the more fundamental to the environment an item will be and the more resistance behavior will be exhibited.

4. Penetration to the basic level may well be allowed if activity is focused on the interesting or useful layer, but change of things at the basic level require special activity and conditions. Key actors requesting change or

influence even on basic items require concern for some of the following.

EXHIBIT III


Change Targets
Change method
Mix of cognitive and emotional approach
Modest behavior change
Different interaction patterns
New paper coordination methods, budgets, schedules etc.
new official channels of communication
Different role expectations
Intensive educational programs; new divisions of labor and authority structure
Different orientations and values
New reward systems; different leadership styles
Different basic motives (achievement, power, affiliation, etc.)
New selection criteria; replacement of incumbents; or major strategy change
Fundamental behavior change
Cognitive
Emotional

5. The extension agent needs information and direction about the environment. The key actors need to know answers about the following questions since they do indicate what and how something is expected to happen and probably gives direction about who would have the most influence or impact in the environment.

EXHIBIT IV
KEY ENVIRONMENT QUESTIONS

1. What changes are needed
   - . category
   - . cause
   - . constraints
2. Who decides about changes suggested
3. Who influences change
4. What influences change
5. What the target for change is
6. What strategy is needed to implement change
7. What the situation will be when the change has occurred
8. How the change will be tracked

6. If all these steps are taken care of, one should have a clear picture of where a program development effort in the school and community can be undertaken and under what conditions. Experience indicates also that logic does not control reality. What makes sense and explains things may not in fact provide control over reality but rather just a point of reference, a meeting point for expectations.

D. Installing Change in an Organization

1. Many of us in education use our organizations as protection for our autonomy and protection from outside influences. Extension agents are mostly outsiders. They are not the persons hired to do the teaching or managing. They are the process helpers. As process helpers they work with the individuals in their jobs. They also have to contend with the organizations educators surround themselves with. If the boundaries and protocols are overcome on the way to acceptance, they will reappear in new forms on the way to consolidation. Installation requires both 1) acceptance by the appropriate functionary and 2) consolidation into the normal operating procedures of the organization.
2. Those involved in selecting, supervising and managing the extension agent need to review the organization to determine what jobs need to be done by the extension agent and by others in the organization. One form for this analysis is the following:

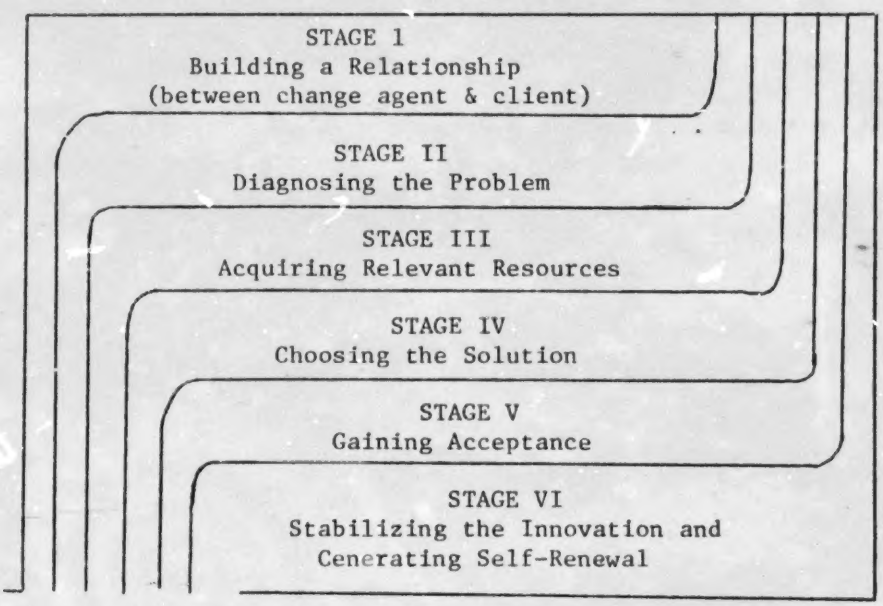
(see the following page)

EXHIBIT V
STAGES FOR INSTALLATION IN AN ORGANIZATION

Stages	Jobs to be Done: Communicating	Consulting	Controlling	Approving	Adjudicating	Securing	Allocating	Doing	Participating	Evaluating	Disseminating
Identify problems/needs/targets											
Analyze setting											
Organize management											
Identify objectives											
Specify methods											
Construct prototypes											
Analyze results											
Revise											
Implement											
Evaluate											
Report											
Make Visible Results											

3. Such an analysis will not only identify areas of activity for extension agents but also who and what group will be involved with the field agent. How the extension agent chooses to help individuals or groups so identified probably relates most directly to the extension agent's analysis of the stage of change of each individual or group. The Havelock grid (attachment A) can be most useful for this analysis if the extension agent is able and willing to use all the strategies and tactics suggested including other change agents, R & D groups, and products requiring training or systematic adoption. In addition, the extension agent should be aware of where he/she is in the change process with the individual or group involved:

EXHIBIT VI
CHANGE AGENT STAGES



and choose personal action strategies accordingly.

4. How much change and what kind of change the extension agent is expected to install will influence how long and in what manner the installation will occur. As individuals accept, adopt, and install so will organizations. Use of the organization's patterns for acceptance, approval and stabilization (allocation) will require careful description to the extension agent by key actors. Tolerant acceptance of alternative strategies suggested by the extension agent will also be required of those inside the organization whose habits are to use the approval and allocation mechanisms for protection. The extension agent's success in installation requires the cooperation of these devices designed to protect from such outside influences.

E. Task Completion as Outsider

1. The extension agent operates on the edge of organizations. The agent is neither of or in an organization; as a linker the agent carries information, experience, results, processes, products from one point to another. The agent is not part of either agency. As one agent stated: "Now I know how an electric wire feels: carrying energy but never knowing if any light goes on."

2. If the extension agent's tasks come from an analysis of expected results, task completion is at best longterm. Results are expected in a year. The day by day feeling of success comes only from knowing that the pieces of the puzzle will come together someday. Experience indicates that most successful extension agents invent ways of drawing pictures or maps or tracings about where they have been and are going in the environment on the road to task completion. Words like tracing, map, picture may be too strong even, since the actual reality of events and activity may well be perceived differently by all at different points in time. For example, often a decision perceived

of as a solution at one point turns out to be relationship building at another.

3. The extension agent sees tasks completion as discrete events outside of the normal events of organizations. Inside the organizations, the influence, training and consolidation energy provided by these seemingly discrete events is not clearly attached to the extension agent, nor is it often acknowledged. The extension agent finds support, recognition, identity as lacking often because the influence of an outsider has not yet been acknowledged, nor can it be. So no one confirms that the task did get done. If not acknowledged even, how can the extension agent assert task completion?

4. Significantly, since tasks are what they are for extension agents, quality of performance is difficult to document or to justify. Often the most impactful action results in major uncomfortableness, confusion, and even frustration by the institution affected, as well as by the extension agent. Until the objective is in fact confirmed as complete, the effect of individual activities cannot be evaluated in context. Until acceptance and absorption are reached, one event influenced or even initiated by an outsider does not an evaluation make.

F. Selecting Extension Agents

1. Extension agents are often selected on the basis of their experience and adaptability to the political environment or formal organization to be changed. Rarely is content expertise in the area to be changed of major concern. NEPTE's experience indicates an alternative approach: that key actors should agree on cognitive, affective, experiential and other characteristics which will facilitate reaching the penetration, installation, and task completion expectations. At this time, we use the following Rating Scale as the basis for this discussion since most successful extension agents have most of the competencies listed here.

EXHIBIT VII

RATING SCALE FOR SELECTION OF EXTENSION AGENT

1. Cognitive	
. understanding of "self" and impact of "self"	1 2 3 4 5 6 7
. ability to analyze complex situation	1 2 3 4 5 6 7
. ability to report objectively	1 2 3 4 5 6 7
. ability to develop alternatives	1 2 3 4 5 6 7
2. Affective	
. attitude toward involving others	1 2 3 4 5 6 7
. attitude communicated to others	1 2 3 4 5 6 7
. attitude toward divergent values	1 2 3 4 5 6 7
. attitude toward divergent beliefs	1 2 3 4 5 6 7
. attitude toward change	1 2 3 4 5 6 7
3. Experience	
. in political process	1 2 3 4 5 6 7
. in reporting, recording	1 2 3 4 5 6 7
. in planning and implementing a change effort	1 2 3 4 5 6 7
. in collecting and organizing objective information	1 2 3 4 5 6 7
4. Other	
. Tolerance for ambiguity	
- personal	1 2 3 4 5 6 7
- role	1 2 3 4 5 6 7
- organizational	1 2 3 4 5 6 7
. Need for recognition	
- self	7 6 5 4 3 2 1
- role	1 2 3 4 5 6 7
- organization	7 6 5 4 3 2 1
. Need for closure (or task completion)	
- self	7 6 5 4 3 2 1
- task	7 6 5 4 3 2 1
- group	1 2 3 4 5 6 7
- organization	7 6 5 4 3 2 1

The creation of a selection grid also provides a basis for evaluation. The list becomes the areas for performance monitoring along with product and activity quality monitoring. Thus the extension agent knows the basis for selection, the areas of performance expectations, and the general environmental/organization penetration characteristics.

2. Selection of an extension agent requires

   (a) Identification of linking to outside information or expertise as appropriate strategy for organization growth by key actors

   (b) Discussion of Expectations about growth: characteristics of organization, environment, personnel, processes

   (c) Determination of Expected Results for Extension Agent activity

   (d) Determination of Qualities for Extension Agent - preparation of rating scale

   (e) Determination of Selection Process itself , including activities required of candidates

   (f) Completion of Rating Scale on all individuals

   (g) Informing the Selected Candidate about expectations of results, characteristics of environment and organization, rating received, and evaluation/reporting procedure

   (h) Implementation

   (i) Evaluation

RELEVANCE OF STRATEGIES AND TACTICS FOR STAGES OF CHANGE

X = Relevant
XX = Especially Relevant

	STAGE I (Relationship)	STAGE II (Diagnosis)	STAGE III (Resource Retrieval)	STAGE IV (Solution)	STAGE V (Acceptance)	STAGE VI (Stabilization
Action Research		X		X	X	
Authentic Feedback	X	XX	X	XX	XX	X
Brainstorming			X	XX		
Change Agent; External	X	XX	X	X	X	X
Change Agent; Internal	X	X	X	X	X	XX
Collaborative Action Inquiry	XX	XX	X	X	XX	X
Confrontation	X High Risk	X Some Risk			X High Risk	
Consultation	X	XX	XX	XX	X	X
Derivation Conference	X	X	XX	XX	X	
Diffusion, Natural					X	X
Experimental Demonstration			X	X	X Some Risk	
Fait Accompli					X High Risk	
Financial Support	X	X	X	X	X	XX
Force Field Analysis		XX		XX	X	
Group Observation/Process Analysis	X	X		X	X	X
Human Relations Laboratory	XX	X			X	
Inter-organizational Visiting		X	XX	X	X	
Leadership Change	X	X		X	X	X
Legislated Change					X Some Risk	X
Linkage	XX	XX	XX	XX	XX	XX
Mass Media Dissemination			X	X	X	
Multiple Media Approaches	X	X	XX	X	XX	X
Network Building			X			X
Opinion Leadership Utilization	X			X	XX	
Overlapping Groups			X		X	XX

(Continued on next page)

from Ronald Havelock Guide to Innovation in Education,
Center for Utilization of Scientific Knowledge, U. of Mich., 1970.

	STAGE I (Relationship)	STAGE II (Diagnosis)	STAGE III (Resource Retrieval)	STAGE IV (Solution)	STAGE V (Acceptance)	STAGE VI (Stabilization
P kaging for Diffusion			X	X	X	X
Pr tige Suggestion	X Sometimes				X Sometimes	
Problem Solving	X	XX	X	XX	XX	X
Product Development			X	X	X	X
R&D Unit		X	X	X		X
R,D,& D			X	X	X	X
Reflection	XX Some Risk	XX	X	XX	XX	X
Research Evaluation	X	XX	X	X	XX	X
Role Playing	X	X			X	X
Rotation of Roles	X	X	X		X	
Sensitivity Training Group	X Some Risk	X			X Some Risk	
Successive Approximation				X	X	X
Survey Feedback		X		X		X*
System Self-Renewal	X	X	X	X	X	XX
Systems Analysis	X	XX	X	XX	X	X
Temporary Systems	XX	X		X	X Some Risk	
Training					X	X
Translation			X	X	X	X
User Need Surveys		X				X*

*Periodic survey feedback can be a part of building system self-renewal.